API MONETIZATION PLATFORM - AIRTEL INDIA 1.0

SmartAPI Partner Self-Care Portal User Guide

Document Version 1.0.1

This SAPI PSCP User Guide has been prepared for Airtel India.

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Terminology

Term	*Description or Terms in an acronym/abbreviation*
Aggregator	Aggregators are intermediaries between the mobile carrier and content providers. They provide connectivity to Airtel for content providers.
AMP	API Monetization Platform
AoC	Advice of Charge
ASE	API Services Enabler
ATI	Airtel India
Charge	Payment transaction
CP	Merchant or Content Provider
EULA	End User License Agreement
One-Off purchase	One time charge purchase (as opposed to a subscription for which the Payments and Settlement Engine generates user charges on a periodic basis)
Partner	'Partner' is the generic term for entities that connect to AMP. A partner may be an aggregator of content providers or a single content provider that directly connects to AMP.
PCC	Purchase Category Code, the term used in OneAPI to denote Media Type
PME	Partner Management Engine
PSCP	SmartAPI Partner Self-Care Portal
PSE	Payments and Settlement Engine
PSL	Portal Service Layer (API layer of PME)
REST	Representational state transfer (REST or RESTful) is a style of software architecture for distributed systems such as the World Wide Web.
SSO	Single Sign-On
SOAP	A web services protocol specification for exchanging structured information. It used to be called Simple Object Protocol but this definition is no longer valid.
SMSC	Short Message Service Centre
TPS	Transactions per second
URI	Uniform resource identifier is a string of characters used to identify a name of a web resource.
URL	Uniform Resource Locator
WSDL	Web Services Description Language is an XML-based interface description language that is used for describing the functionality offered by a web service.

1 About this Document

1.1 About

This document is a user guide for the Partner Self-Care Portal of the Partner Management Engine (PME), which is an integrated component of AMP-ATI Platform.

1.2 Scope

The purpose of this document is to provide a description of the operations available on the Partner Self-Care Portal including steps for developers and partners to be registered as public users on the platform.

1.3 Audience

The intended audience for this document are public users of the Partner Self-Care Portal, wishing to create TPA (third-party applications) which make use of the services available on the SmartAPI platform, and to manage them from a single application.

1.4 Structure

The document is divided into the following chapters:

Table 1 Document Structure

Chapter	Description
1 About this Document	Provides an overview of this document, including the intended audience, scope, document structure and conventions used throughout.
2 PME Overview	Provides an overview of PME, its components and concepts, and essential information on accessing the Partner Self-Care Portal.
3.Using Partner Self-Care Portal	Introductory chapter on the Partner Self-Care Portal and its Resources page.
4. Creating and Managing Profiles	Describes the two basic operations on the Partner Self-Care Portal – to sign in and to set up a partner entity yourself, or/and be associated with another partner – and to manage your own profile and your partners'.
5. Working from Partner Profile Page	Describes the tasks you can perform in relation to your partners. Includes working with transactions, viewing numbers, purchasing credits, viewing reports, and inviting users and managing associated users.

6. Working with Projects	Describes how to create and manage your projects (applications). Includes the steps required to promote your project from Sandbox status to Production status, and to view service endpoints.
7. Working with Blogs and Forums	Describes the community features provided by PME.

1.5 Conventions Used in this Document

Different letter types and symbols denote different types of information, for example:

× ***This is a warning. It highlights important information which must be heeded in order to avoid potential damage to data or equipment.***

! This is a caution. It contains information which should be considered carefully before continuing.

? This style is used to provide additional information, including tips and help. It is most frequently used for cross-referencing.

2 PME Overview

The PME component comprises a pair of portal applications – the Administrative Portal and the Partner Self-Care Portal – briefly described below, followed by key PME concepts.

2.1 Admin Portal

The Partner Management Engine (PME) component of AMP provides capabilities for partner onboarding and application provisioning and management, including association of settlement contracts with partners, and defining of service contracts for applications, to the point of making applications available in production.

From the Admin Portal, service providers can maintain all partner data in a single place and ensure smooth and correct functioning of the end-to-end delivery and charging of applications. E-mail based notifications can be set up, and direct API integration for automatic provisioning of external systems is possible.

The Admin Portal includes a Content Management System (CMS) that allows Partner Self-Care Portal content look and feel to be adapted (skinned) to suit the service provider's brand.

Online and offline reports generated via AMP are made available to PME, with restrictions applied on reports visibility based on users' permissions to the component.

2.2 Partner Self-Care Portal

The PME Partner Self-Care Portal provides a comprehensive and fully automated partner management system built on open standards. It offers a host of partner self-care features to simplify management and automate business processes between the service provider/operator, ie, Airtel India, and a large number of third parties. It also provides various resources for developers including API documentation, code samples, developer forums and blogs, etc, to help partners consume service provider APIs.

Individual developers can onboard their applications via an approved partner. The partner can choose the required services via a service contract at the point of application registration. A service contract also defines policies that apply to the services.

2.2.1 Access to Partner Self-Care Portal

A partner/developer can gain access to the Partner Self-Care Portal in one of four ways:

- as a User created on Admin Portal: The administrator can add users from the Admin Portal and furnish them with a role and/or permissions to access the Partner Self-Care Portal. The administrator can associate a user with a particular partner or select a user as the primary

contact when creating a partner, and adjust Partner Access settings to grant permissions to invite other users to the Partner Self-Care Portal or to make changes to partner applications.

- as a Primary Contact for a partner created on Admin Portal: The administrator can create a new user as the primary contact for a partner, during the partner creation process. The primary contact user is granted Admin Access to the Partner Self-Care Portal, and will be able to work in the Admin area.
- by self-registration on Partner Self-Care Portal: A user may register as a public user, and add the name of the associated Partner. A ticket is created and posted to the Admin Portal where it can be approved or rejected, and an email sent to the user. This user is granted a default range of permissions to create and manage applications.
- by invitation from another Partner Self-Care Portal user: A user with appropriate Partner Access settings can invite other users to be associated with the Partner on the Partner Self-Care Portal.

2.3 Concepts

In order to understand the PME Portals, it is important to understand the following concepts:

- Policies
- Service Contracts
- Short codes
- Web Services
- OAuth

These are explained in the following sections.

2.3.1 Policies

A Policy is a restriction put on the capabilities of a service for a particular application. The AMP platform provides policy enforcement at the core service level.

Admin Portal allows users to examine and modify the default policy settings for an application. It also allows users to modify the policy information for different services within a service contract. Any application which has been assigned this service contract will have the associated policies enforced on it.

2.3.2 Service Contracts

Service contracts allow users to apply policies or limitations on a service provided to an application. Default contracts allow users to start off with default policies for each service. It is then possible to change these settings within a service contract in PME, or create a new service contract. Any application which is furnished with the service contract will also be subject to the policy constraints.

2.3.3 Web Services

Web Services are self-describing software modules, which encapsulate discrete functionality. They are accessible via standard Internet communication protocols like XML, SOAP and REST, and can be developed in any technologies (like C++, Java, .NET, PHP, Perl etc.) or used by any technology. This

provides for loose coupling between software modules allowing business rationalization through independent development.

A Web Service is a software system designed to support interoperable machine-to-machine interaction over a network.

A SOAP Web Service has an interface described in a machine-processable format, i.e. WSDL. Other systems interact with the Web service in a manner prescribed by its description using SOAP-messages.

Web Services use a standardized industry protocol for the communication. All four layers (Service Transport, XML Messaging, Service Description and Service Discovery layers) use well-defined protocols in the Web Services stack. This standardization of the protocol stack gives businesses many advantages such as a wide range of choices, reduction in cost due to competition and increases in the quality of available products.

A RESTful webservice follows the Representational State Transfer (REST) style of software architecture. It consists of requests and responses which are built around the transfer of representations of resources, each of which is referenced with a global identifier, e.g. a URI in HTTP. One of the key characteristics of a RESTful Web Service is the explicit use of HTTP methods in a way that follows the protocol as defined by RFC 2616.

2.3.4 OAuth

OAuth, short for Open Authentication, is a framework that enables applications to authenticate subscriber interactions without the knowledge of the credentials of the subscriber. It provides an additional layer of security for the end user, whose credentials are no longer passed across various parties over the web.

- The specification is available at *http://tools.ietf.org/html/rfc6749*.
- A guide for developers for SmartAPI is available as *ASE Application Developer Guide for OAuth Authentication*.

Previously, a user accessing an application that makes use of a web service had to access the web service directly and provide authentication. In OAuth 2.0, the user does not need to supply authentication credentials to the application. Instead the application redirects the user to the Authorization Manager where he is authenticated (for example, by the phone number used if on the network, or by PIN entry on the Authorization Manager screen if off-net) and authorizes access to the web service within the scope provided. Thereafter, tokens and authorization codes are passed between the entities to verify user identity. In this way the application remains ignorant of the authentication credentials of the user.

AMP supports OAuth to authenticate services, by providing an Authorization Server Proxy service which exposes the endpoints that applications require in order to use OAuth. This service will need to have its endpoints defined in the same way as any other ASE service, when the service is provisioned from the Admin Portal. It may also support one or more scopes to restrict the use of the capabilities of the service for any given request.

A partner application configured via its service contract to access an OAuth enabled service (for example, payment) will need to access the OAuth service first to obtain an OAuth Authentication token, with which to populate the Authentication header in the request message to the service (for example, charge request).

3 Using Partner Self-Care Portal

The Partner Self-Care Portal (PSCP) has two distinct areas: Admin and Partner areas.

The content of this document covers the Partners' area, which allows partners to register on the Partner Self-Care Portal and manage projects. Blogs and forums are also available to allow partners to exchange ideas, ask questions and build a developer community around the platform.

The Administrative Dashboard is visible only to users with appropriate permissions to manage and control the information on the Partner Self-Care Portal. For example, she can change the introductory text displayed on each page, or remove threads which have been flagged as inappropriate in the blogs or forums.

In this section, login steps and a description of the Resources page are covered, followed by a sitemap of the Partners' area.

3.1 Logging In

By default, SmartAPI Partner Self-Care Portal runs at the following address:

https://open.airtel.in/

1. Enter the URL in the browser navigation field.
2. Click ***Log In*** at the top right hand corner of the page.

   The Partner Self-Care Portal Login page is displayed.

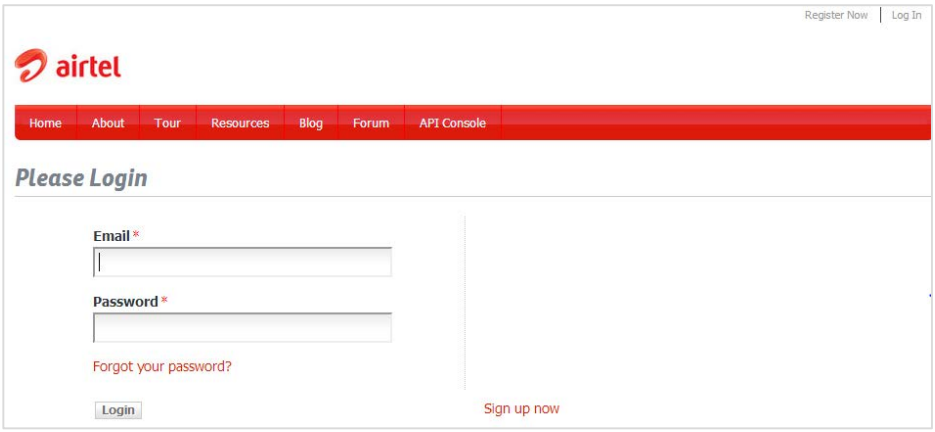

Figure 1 SmartAPI Partner Self-Care Portal Login View

3. Enter the administrator/partner email and password.
4. Click ***Login***.

The user profile page is displayed.

If the user forgets their password, he/she can click ***Forgot your password?*** An email is sent to the address used to register the account, which must be specified by the user. When the user clicks on the link in the email they are then prompted to answer a security question before resetting their password. This security question is specified during the registration process.

? Registering on the Partner Self-Care Portal user is described in section 4.1 Signing Up to Partner Self-Care Portal.

3.2 Resources Tab

If you have been granted view permission to the Resources area, the menu will be visible to you.

Click to view links to resources that should help partners consume service provider APIS and to operate their projects in the live environment. They include:

- API guides and this user guide
- Sample Java Applications

3.3 Partner Self-Care Portal Partner Area Site Map

The sitemap layout below shows the links displayed on the Dashboard in the left column, and follows the UI structure to show features that are hidden under those links.

For example, if you want to change your password, you will be able to reach the relevant page via the Edit Profile link on the Dashboard.

Dashboard

Edit Profile >> click this to access the functions on the right >>>
- Edit User Profile
- Change Password
- Change Email
- Change Security Details

Manage Invitations received

Create a Partner

Manage Partner >>
- Edit Partner Profile
- Partner Details
- View Transactions
- Partner Numbers
- Credits
- Partner Reports, Summary Reports, Settlement Reports
- User Invitations Edit/Delete User
- Invite User to
- Manage Invitations
- Your Documents
- Create a Project
- Manage Project-----
  - Edit Project Details
  - Promote To
  - Manage Notifications
  - Testing Environment /Endpoints

View Invoices

4 Creating and Managing Profiles

This chapter describes the initial steps on the Partner Self-Care Portal, where you register as a user and access the Dashboard, and create a partner entity. Steps to manage your profile and your partner's are also included.

- Signing Up to Partner Self-Care Portal - section 4.1 below
  - Dashboard - section 4.1.1
  - Editing your profile - section 4.1.2
  - Managing invitations you have received – section 4.1.3
- Creating Partners - section 4.2
  - Editing partner profile and adding more information – section 4.2.1

4.1 Signing Up to Partner Self-Care Portal

When you first sign up to Partner Self-Care Portal as a public user, your essential details must be entered on the registration form. You will also be required to register the name of your Partner (Content Provider) entity at the same time. Your profile and the profile of the Partner can be edited and extended later, as described in section 4.2.1.

When the registration request is submitted and accepted, an email will be returned with the login URL for the Partner Self-Care Portal, where you can login with the registered email address and password.

To sign up and create a new user, and an associated partner by default:

1. Click ***Register Now*** on the Partner Self-Care Portal homepage.

   The Registration Form is displayed.

2. Enter the following mandatory details:
   - ***First Name***
   - ***Last Name***
   - ***Email*** - must be unique to the system – required for login to the Partner Self-Care Portal
   - ***Partner Name (SAPI_)*** – the name of the Partner you are associated with, which must begin with the SAPI_ prefix and be at least 9 characters long. A partner by this name will be created.
   - ***Currency*** – select ***Rupee (India)***
   - ***Display Name –*** your name as it will be displayed on the Forum and Blogg
   - ***Password*** – when you click in the field, the password requirements are called out
   - ***Confirm Password*** – re-enter password
   - ***Security Question*** – select the security question – which will be asked if you need to re-set the password
   - ***Security Response*** – enter the answer to the security question

- ***Confirm Security Response*** – re-enter the answer to the security question to ensure it has been entered correctly
- ***Country*** – select India
- ***Locale*** – select English
- ***Time Zone*** – select your time zone. from the dropdown list
- ***Enter this text*** – enter the letters as shown in the image. If there is difficulty reading the letters, click ***Refresh Image*** to view new letters. This is a challenge-response to ensure that the response is not generated by a computer.

3. [Option] Enter optional registration details, which can be added now or later:
   - ***Telephone***
4. Read the terms and conditions in the Terms and Conditions text box and select ***I accept the Terms & Conditions*** checkbox.
5. Click ***Register***.

The page is refreshed and a message will appear to say that the request has been sent for moderation.

- A ticket is raised and an email is sent to the Admin Portal administrator informing them of the registration request. The administrator can choose to accept or reject the ticket, when an email is returned to the user.
- In the approval email, a link to the Partner Self-Care Portal Login page is included, where you will be able to login with the password set above.
- You will be granted standard user access permissions to the Partner Self-Care Portal
- You will also have Admin Access to the partner created by the name you have entered in the registration request and any projects created for the partner. See section 5.1.6 for permission details.

6. Open the link and login with your *email address and the password* you had registered.

You will gain access to the Partner Self-Care Portal Dashboard, where you are registered as a Public User to the partner is created.

The features on the Dashboard are introduced in the next section.

4.1.1 Dashboard Overview

The Dashboard that you will access, is the Partner Dashboard with the following tabs in the menu bar, as shown in the screenshot below:

- Dashboard – click this to return to the Dashboard, from any page
- Resources – contains links to API Guides and sample applications – section 3.2
- Blog – section 7.1
- Forum – section 7.2

Another tab, the Admin, is visible to users with appropriate permissions granted by the administrator. The tab allows management of Partner Self-Care Portal contents, blogs and forums.

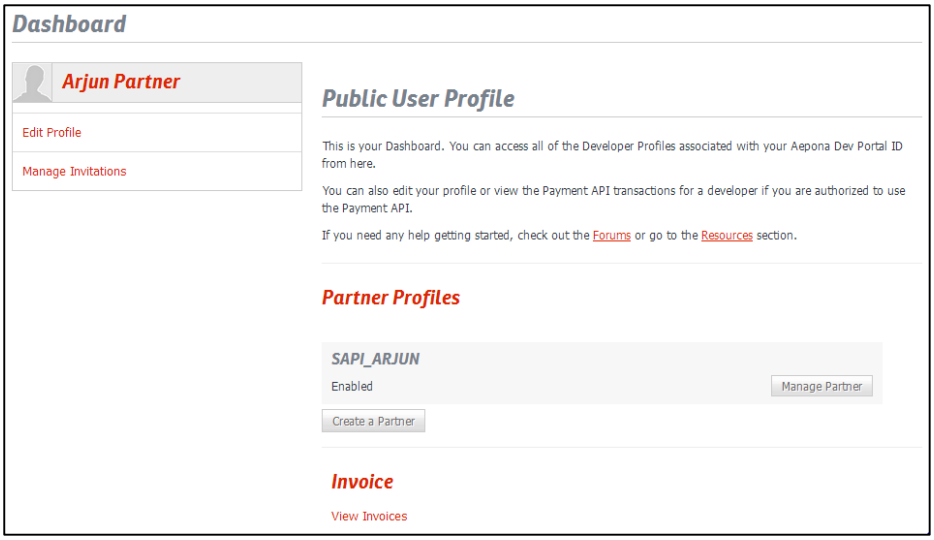
Dashboard
Arjun Partner
Edit Profile
Manage Invitations
Public User Profile
This is your Dashboard. You can access all of the Developer Profiles associated with your Aepona Dev Portal ID from here.
You can also edit your profile or view the Payment API transactions for a developer if you are authorized to use the Payment API.
If you need any help getting started, check out the Forums or go to the Resources section.
Partner Profiles
SAPI_ARJUN
Enabled
Manage Partner
Create a Partner
Invoice
View Invoices

Figure 2 Dashboard

From the Dashboard, you can click

- ***Edit Profile*** link to edit or add more details to your profile – section 4.1.2 below
- ***Manage Invitations*** button to accept or reject an invitation to become associated with a partner - section 4.1.3
- ***Create a Partner*** button, to create a partner entity - section 4.2

  Once a partner is created, the partner name will be displayed in the Partner Profiles area, and you can click
- ***Edit Partner*** button to edit partner details - section 4.2.1
- ***View Invoices*** link to be redirected to the Invoicing Portal – section 4.3

4.1.2 Editing User Profile

You can edit your user profile details, and add additional information after the initial registration.

- to edit/add to your User Profile details – see below
- to select your community options (display name/alias on Blogs and Forums) – see below
- to change your password – section 4.1.2.3
- to change your email – section 4.1.2.4
- to change your security details – section 4.1.2.5

4.1.2.1 Editing User Profile Details

To edit your user profile, including Personal, Options, Community and Professional details:

1. From the Dashboard, click ***Edit Profile*** link, either under your image, or on the top right hand corner of the page.

The *Dashboard > Edit User Profile* page is displayed:

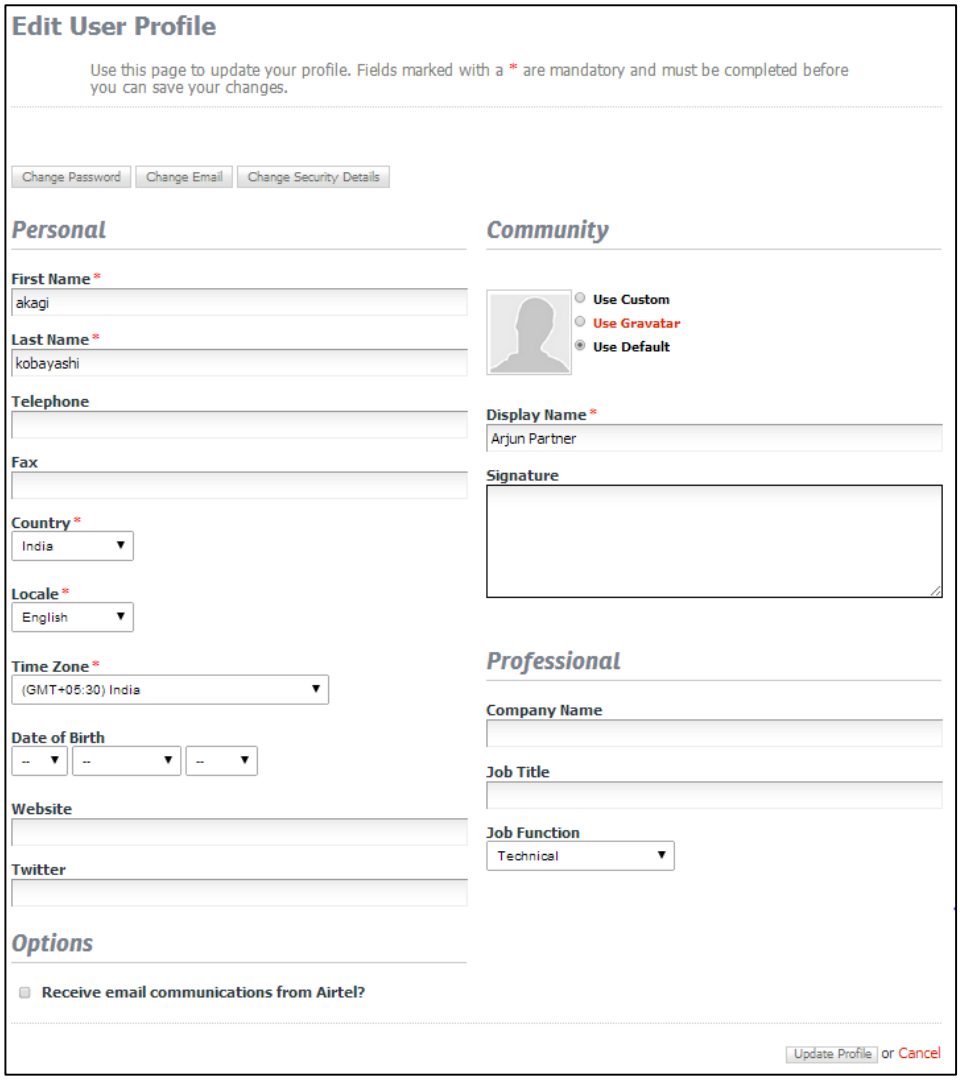

Figure 3 Edit User Profile page

The following fields are available to be added or edited. Mandatory fields are marked with an asterisk:

Personal section fields:

- First Name*
- Last Name*
- Telephone
- Fax
- Country*
- Locale*
- Time Zone*
- Date of Birth
- Website
- Twitter

Options section field:

- ***Receive email communications from Airtel?*** - select check box to receive emails

Community section fields:

- ***Use Custom*** – to use a custom image, for example. A Choose File button will appear to upload your image file
- ***Use Gravatar*** – to use your existing Gravatar, or to click this link to be redirected to *en.gravatar.com* site to get your Gravatar
- ***Use Default*** – to use your default image
- ***Display Name****
- ***Signature***

Professional section fields:

- ***Company Name***
- ***Job Title***
- ***Job Function*** – select from the dropdown list

2. Edit as appropriate and click ***Update Profile***.

4.1.2.2 Changing User Password

To change your password to access the Partner Self-Care Portal:

1. From the Dashboard, click ***Edit Profile*** link, either under your image, or on the top right hand corner of the page. The Dashboard > Edit User Profile page is displayed.
2. Click ***Change Password*** button. The Change Your Password page is displayed.
3. Enter your ***Current Password, New Password*** and repeat in the ***Confirm Password*** field.
4. Click ***Change Password***.

Your profile is updated and you will be returned to the Edit User Profile page.

4.1.2.3 Changing User Email

To change your primary email address on your user profile:

1. From the Dashboard, click ***Edit Profile*** link, either under your image, or on the top right hand corner of the page. The Dashboard > Edit User Profile page is displayed.
2. Select ***Change Email*** in the left hand panel. The Change Email Address page is displayed.
3. Enter your ***Current Password***, new ***Email*** address and repeat the address in the ***Confirm New Address*** field.
4. Click ***Change Email***.

Your profile is updated and you will be returned to the Edit User Profile page.

4.1.2.4 Changing User Security Details

To change your security question and answer on your user profile:

1. From the Dashboard, click ***Edit Profile*** link, either under your image, or on the top right hand corner of the page. The Dashboard > Edit User Profile page is displayed.
2. Select ***Change Security Details*** in the left hand panel. The Security Details page is displayed.
3. Enter your ***Current Password***, select a security question from the dropdown list, enter the ***Security Response*** and repeat the response in the ***Confirm Security Response*** field.
4. Click ***Submit***.

Your profile is updated and you will be returned to the Edit User Profile page.

At the same time, a notification of change is sent to your registered email address.

4.1.3 Managing Invitations Received

If another user has invited you to be associated with a partner, you will see the invitations in the Manage Invitations page accessed from your Dashboard.

To accept or reject an invitation received:

1. From the Dashboard, click ***Manage Invitations***. The Manage Invitations page is displayed.
2. Click ***Accept*** or ***Reject***. An email notification of the event will be sent to the user who invited you.

4.2 Creating Partners

To create an additional partner entity on the Partner Self-Care Portal, you must register the essential details from the Create New Partner page. The partner profile can be edited and extended later with optional details, before any of the projects are promoted to production.

The system assumes that you are the Contact for the partner you are creating. Therefore the details of the profile of the current logged in user – you – are used to auto-populate the relevant fields.

To create a partner on the Partner Self-Care Portal:

1. From the Dashboard, click ***Create a Partner*** button.

   The *Create New Partner* page is displayed:

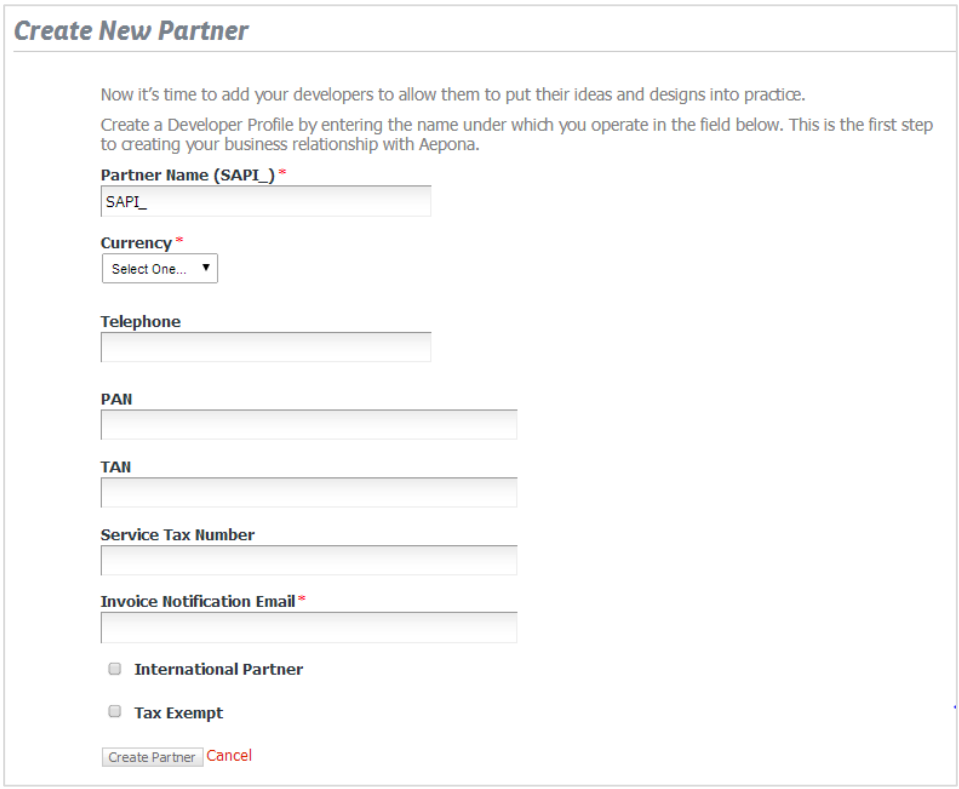
Create New Partner
Now it's time to add your developers to allow them to put their ideas and designs into practice.
Create a Developer Profile by entering the name under which you operate in the field below. This is the first step to creating your business relationship with Aepona.
Partner Name (SAPI_) *
SAPI_
Currency *
Select One...
Telephone
PAN
TAN
Service Tax Number
Invoice Notification Email *
International Partner
Tax Exempt
Create Partner
Cancel

Figure 4 Create New Partner page

2. Enter the following mandatory details:
   - ***Partner Name***
   - ***Currency***
   - ***Invoice Notification Email***

3. [Optional] Enter the following details:

   - ***Telephone***
   - ***PAN*** *– Permanent Account Number*
   - ***TAN*** *– Tax Deduction Account Number*
   - ***Service Tax Number***
   - ***International Partner –*** *select if located outside India*
   - ***Tax Exempt*** *– select if this is your tax status*

4. Click ***Create Partner***.

The partner is created and enabled by default. You will be able to edit the telephone number later, but the Partner Name and Currency will be fixed.

4.2.1 Editing Partner Profile

You can edit the details of your partner from the Edit Partner Profile page, as long as your projects are still in Sandbox status.

To access the Edit Partner Profile page and edit your partner details:

1. Click ***Dashboard*** tab to access the Dashboard.
2. Click ***Manage Partner*** button for the partner you wish to edit. The Partner Profile page is displayed, with the partner name displayed in the left hand panel, as shown in the screenshot in the section below.
3. Click ***Edit Partner Profile*** link. The Edit Partner Profile page is displayed.

The partner name and currency are not editable. In addition to the details added during Partner creation as listed in the section above, the following details can be added.

The following fields are mandatory:

- ***Jurisdiction of Incorporation or Formation*** – *for example, India*
- ***Type of Business*** – *select from the dropdown list of Sole Proprietorship, Partnership, Corporation*
- ***Support Information***
  - ***Support Email Address***
  - ***Support Telephone Number***
- ***Primary Address, Billing Address***
  - ***Address Line 1***
  - ***Address Line 2***
  - ***City***
  - ***Province/State***
  - ***Country***
  - ***Postal/ZIP Code***
- ***Use primary address as billing address*** – select to auto-populate the billing address fields
  - ***Invoice Notification Email*** – enter a valid email address for receiving invoices

4. Edit as appropriate and click ***Update Partner Profile***. You will be returned to the Partner Profile page.

4.3 Viewing Invoices

Click ***View Invoices*** link on the Dashboard to be redirected to the Invoicing Portal where you can conduct your financial operations in relation to your associated partners and projects.

Details are provided in a separate document, User Manual – Invoice Portal, in the User Invoice Portal sections.

5 Working from Partner Profile Page

The Partner Profile page is the activity base for the partner, from where you can register your application as a project, and engage in various activities related to your project.

From the Dashboard, click ***Manage Partner*** button for the partner to access the page.

An example page is shown below:

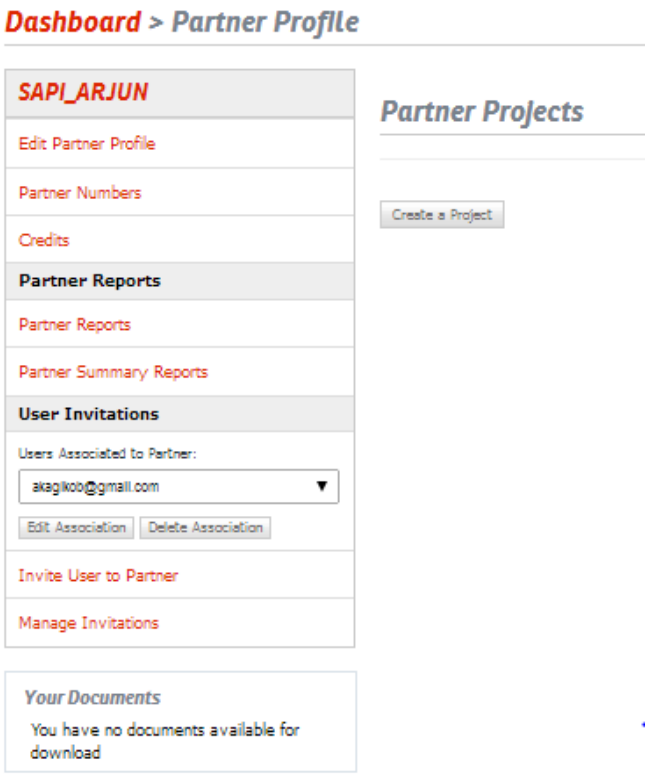

Figure 5 Partner Profile page

From here, you can:

- Edit Partner Profile to edit/add and update partner details, as described in sections 4.2 and 4.2.1
- Create and work with projects - described in chapter 6

And view/work with:

- *Partner numbers* – Shortcodes/long numbers allocated to the partner will be displayed on this page, when the Notifications feature is introduced in the forthcoming phase
- *Credits* – new feature coming soon! You will be able to use PayPal to manage prepaid credits.
- Reports – Live, Summary and Settlement – section 5.1.1
- Inviting users - section 5.1.2
- Managing Invitations/Partner-User Associations – sections 5.1.3

5.1.1 Partner Reports

Partners can generate and view a range of reports of three types: live – generated from current data, and summary – from archived data, and settlement reports.

To generate and view Partner reports:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Click ***Partner Reports*** in the left hand panel for online/live reports

   OR

   Click ***Partner Summary Reports*** for offline/archived data reports
3. Select the ***Report*** from the dropdown list. The following reports are available:

Table 2 Partner Reports

Partner Reports	*Partner Summary Reports*
CallLegReportForCallForPartner	CallCountsPerApplication
CallLegReportForPartner	CountsPerApplication
CallReportForCallLefForPartner	CountsPerOperation
CallReportForPartner	TrafficSummaryPerPartner
CountsPerApplication	
CountsPerOperation	
CountsPerOperationStackedBarChart	
Hits24HrsApplicationForPartner	
Hits24hoursForPartner	
QueryDumpForPartner	
RoundTripPerServiceForPartner	
ServiceReportAttributesForPartner	
ServiceReportForPartner	
TPSPerServiceForPartner	

   The page will reveal the relevant parameter input fields for the particular report selected, for example, Date Range, Application Status (Production, Sandbox, limited-production), etc.
4. Enter the parameters as required.
5. For Partner and Partner Summary Reports, select the report format from the dropdown list: HTML, CSV, PDF or XLS.
6. Click ***Submit***.

   The report will be generated and displayed online, in the lower part of the page.

5.1.2 User Invitations

A Partner can send invitations to other users to become associated users. The partner can grant them access to all of their profile, or provide them with a more limited profile, whereby they have access to everything except they cannot send or cancel invitations to other users.

Users who have received an invitation can accept or reject it from their Dashboard as described in section 4.1.3.

5.1.2.1 Sending and Managing Invitations

To invite a user as an associate with the Partner:

1. Access the ***Partner Profile page*** for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Click ***Invite User to Partner*** in the User Invitations section in the left hand panel.
3. Enter the user's ***Email*** address and a ***Note,*** a short message to include with the invitation.
4. In the ***Partner Permission*** section, select the type of access to grant this user. There are two options:
   - Standard Access – the user can view and update partner details but cannot invite other users to be associated with the partner
   - Admin Access – the user can view and update partner details and can also invite other users to be associated with the partner
5. In the ***Partner Project Permission*** section, which is displayed if the partner has any projects, select the type of access to grant this user for each of the partner's projects listed. There are three options:
   - No Access – the user cannot view or update any of the partner's project details
   - Standard Access – the user can view and update project details, except for the three privileges granted to Admin Access permission
   - Admin Access – available for users with Partner Permission - Admin Access only, the user can view and update project details, and also
     - Disable project endpoints
     - Disable a project entirely
     - Remove the service contract for a project
6. Click ***Submit***.

An invitation request will be sent. The email received by the user differs depending on whether or not they are already registered on Partner Self-Care Portal:

- if the user already ***has*** a Partner Self-Care Portal profile, in other words if the user is already registered – the user can click on the link in the email to access the Partner Self-Care Portal Manage Invitations screen. From there, the user can either Accept or Reject the invitation.
- if the user has ***not*** got a Partner Self-Care Portal profile – there will be two hyperlinks in the invitation email, which will allow the user to either Accept or Reject the request.

- If accepting the request, the User Registration For Partner page is displayed in a browser window. To complete the process, user must add registration details and click ***Accept***.
- If rejecting the request, an email is sent to the partner to notify them of the rejection.

If a decision has not been made by the user after a significant amount of time, the partner can resend the invite by clicking on ***Manage Invitations*** in the Partner Profile page, and clicking ***Resend*** beside the user, as described in the next section.

5.1.2.2 Resending/Cancelling Invitations

To resend or to cancel an invitation to a user to be associated with a Partner:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Click ***Manage Invitations*** in the User Invitations section in the left hand panel.
3. Click ***Resend*** or ***Cancel***.

The invitation email is resent, or an email notifying of the invitation cancellation is sent, as applicable.

5.1.3 Managing Partner-User Associations

The following two types of associations can exist between a Partner, each of his projects, and user:

- ***Partner Permission***:
  - Standard Access – the user has access to all aspects of the Partners' Area, except they cannot ask other users to associate with the partner or remove associations.
  - Admin Access – the user has access to all aspects of the Partners' Area. They can invite other users to associate with the partner, as well as remove associations
- ***Partner Project Permission:***
  - No Access – the user cannot view or update any of the partner's project details
  - Standard Access – the user can view and update project details, except for the three privileges granted to Admin Access permission
  - Admin Access – *available for users with Partner Permission - Admin Access only,* the user can view and update project details, and also
    - Disable project endpoints
    - Disable a project entirely
    - Remove the service contract for a project

5.1.3.1 Editing Associations

To edit an association between a Partner and user:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Select the user from the ***Users Associated to Partner*** drop down list in the User Invitations section in the left hand panel.

3. Click ***Edit Association***.
4. Change the type of access granted to the user.
5. Click ***Submit***.

5.1.3.2 Deleting Associations

To delete an association between a Partner and user:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Select the user from the ***Users Associated to Partner*** drop down list in the User Invitations section in the left hand panel.
3. Click ***Delete Association***.
4. Click ***OK*** to confirm the removal of the association.

6 Working with Projects

You can create an application/project from the Partner Profile page, where existing projects will be listed and available to be edited via the Manage Project button.

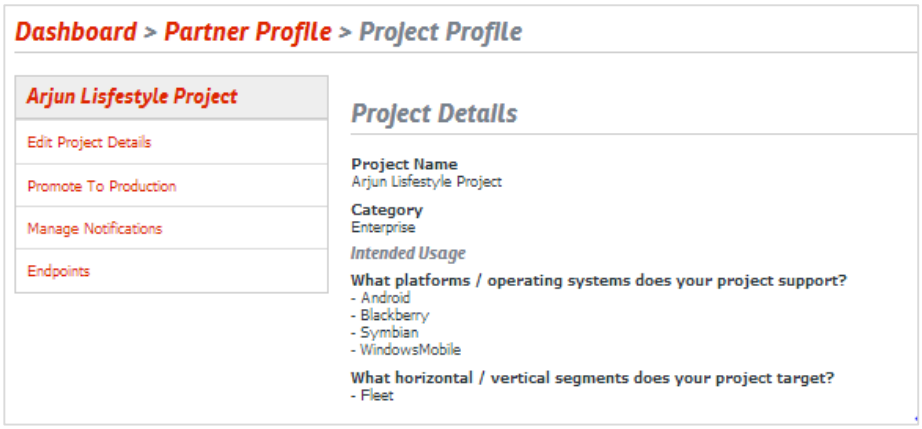

Figure 6 Project Profile page – a new project

The Project Profile page is the activity base for each project, from where you can edit your project details, view your endpoints, promote your project to production and manage notifications.

This section describes how to –

- *create projects and edit project profile* – described below in sections 6.1 and 6.2
- *promote projects to production* - section 6.3
- *manage notifications* – new feature coming soon! You will be able to assign numbers to your project and manage notifications
- *view endpoints and project credentials* – section 6.4

6.1 Creating Projects

To create a project for a partner:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Click ***Create a Project*** in the Partner Projects panel.

   The Create a Project page is displayed, as shown below. Fields marked with a red asterisk are mandatory. The project cannot be created until these are completed.

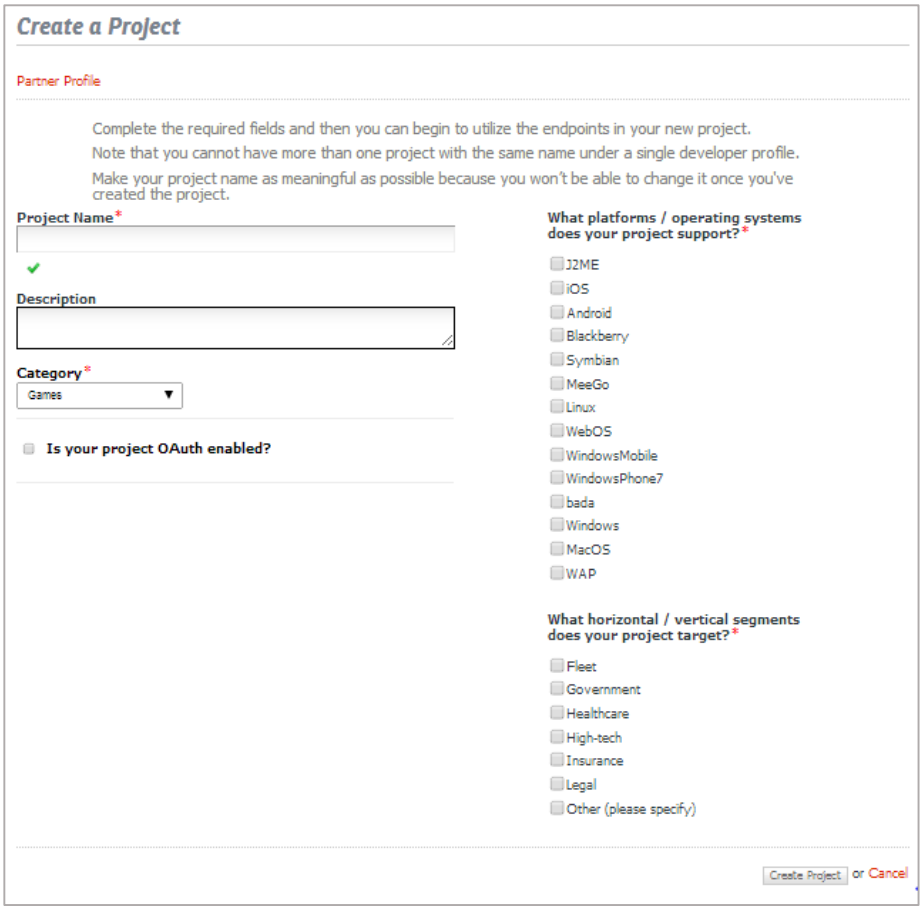

Figure 7 Create a Project page

3. Enter your project name as appropriate, in the ***Project Name*** field.
4. Select one ***Category*** from the dropdown list. The following categories are available:

   Games, Ringtones, Video, Messaging, LBS, Prosumer, Enterprise, Infrastructure/Middleware, Tools, Other (please specify in the field that opens when you select this)
5. Select the ***platforms/OS*** supported by your project from the list displayed.
6. Select the ***horizontal/vertical*** market ***segments*** targeted by your project, from the list displayed.
7. [Option] Enter a ***Description*** of your project.
8. [Option] Select ***Is your project OAuth enabled?*** as applicable. When you select this, mandatory fields will appear as shown below:

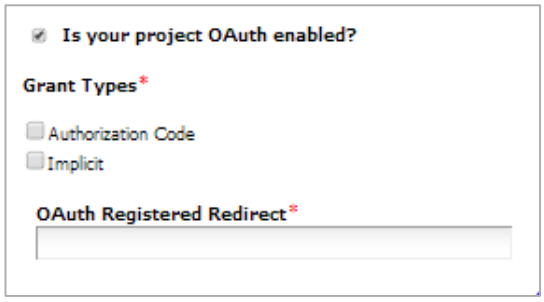

Figure 8 OAuth selected fields – mandatory for OAuth

- Select the *Grant Type* as applicable:
  - *Authorization Code* – the default OAuth flow
  - *Implicit* – if your application is not on a website but entirely on your browser, and capable of extracting the Access Token from the URI
- Supply at least one ***OAuth Registered Redirect*** (comma separated) to receive the subscriber redirect from the OAuth service.

9. Click ***Create Project***.

You are redirected to the updated Project Profile page, and an email will be sent to you with the application user name.

> ! When a project is first created it is granted *Sandbox*. status. When you go back to the Partner Profile page, you will see the project displayed as *Enabled.*

6.2 Editing Project Profile

Project details can be updated whilst the project is in Sandbox status.

To edit the details of an existing project for a partner:

1. Access the Partner Profile page for the partner (= click through Dashboard tab > Manage Partner button for the partner > click Edit Partner Profile link).
2. Access the Project Profile page for the project by clicking ***Manage Project*** for the project displayed in the Partner Projects panel.
3. Click ***Edit Project Details*** in the left hand panel. The Edit Project page for the project is displayed.

The *project name* and *Revenue Share %* are not editable; all other fields from the Create a Project page are available to be updated. See section above on creating projects for details of the fields.

4. Edit as appropriate and click ***Update Project Profile***.

6.3 Requesting Project Promotion to Production

In order to enable a project to operate in production mode, the partner must first complete three steps in Partner Self-Care Portal as described in this section. A request for promotion is then logged

in Admin Portal, and an email is sent to the administrator. It is then the responsibility of an Admin Portal administrator to approve the promotion. You will be notified of the decision by email.

To use the Subscription model of payment, it will be necessary to register a Subscription Product on the Subscription Provisioning Platform upon approval of the promotion. See section 6.4.3

An indicator is displayed at the top of the Promote to Production page to inform the partner of the stages that they go through, as shown in the screenshot below:

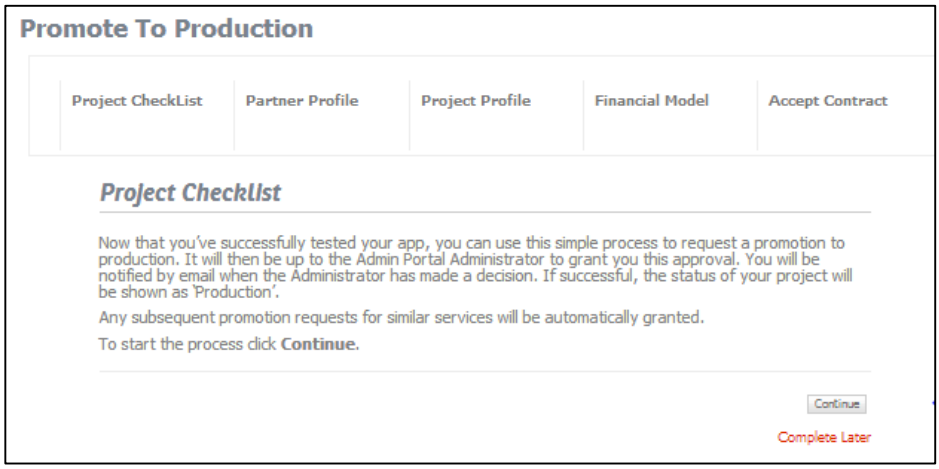
Promote To Production
Project CheckList
Partner Profile
Project Profile
Financial Model
Accept Contract
Project Checklist
Now that you've successfully tested your app, you can use this simple process to request a promotion to production. It will then be up to the Admin Portal Administrator to grant you this approval. You will be notified by email when the Administrator has made a decision. If successful, the status of your project will be shown as 'Production'.
Any subsequent promotion requests for similar services will be automatically granted.
To start the process click Continue.
Continue
Complete Later

Figure 9 Promote To Production page – Project CheckList view

? At any point during the promotion process, you can interrupt your work by clicking ***Complete Later*** button at the bottom of the page. The details input so far will be saved.

6.3.1 Requesting Project to Promotion – the First Time

To request your project to be promoted to production:

1. Click ***Promote To Production*** on the Project Profile page.

   The Promote To Production page is displayed, with a brief description of the promotion process in the Project Checklist section.

2. Read the Project Checklist carefully and click ***Continue***. The Partner Profile view is displayed.

3. Check your ***partner profile*** is correct and update as appropriate, adding any missing mandatory information.

4. Upload ***Business Documentation*** – official document, for example as listed below, in pdf format:

   - Tax Registration Certificate
   - Corporate Registration Certificate
   - Form 10F from your Tax Authority

   And also if you are operating Internationally:

   - PE – Permanent Establishment document
   - TRC – Tax Residency Certificate

5. Click ***Continue***. The Project Profile view is displayed.
6. Check your ***project profile*** is correct.

> ! You will not be able to edit some of the project profile details once the project is promoted to production. Those attributes are marked with an asterisk in the steps below.

7. Add ***Description*** if not added previously. This is now mandatory.
8. Add the following additional mandatory information:
   - ***Incoming IP address*** - in a comma separated list of IP addresses, as applicable
   - ***Revenue Share %*** - enter a figure between 0 and 100
   - ***sales/distribution channels*** - select the ones used by your project from the list
9. [Option] Select ***Request access to billing API*** if required.

   When this is selected, the following Billing related fields become mandatory:

   - ***Purchase Category Code (Media Type)**** – *select music, book or game*
   - ***Purchase Category Code Price – Min** and Max**** *values, in numbers with two decimal points*
   - ***Content Provider*** – *the name of the Content Provider*
   - ***Billing Questions Contact*** – *enter the name of the person*
   - ***Application Support Contact*** – *enter the name of the person*
   - ***Supporting Documents*** – *upload as required, for example, GST506 form, in pdf format*

   The following selection is optional:

   - ***[Option] Request for Subscription Services*** - see section 6.4.3 for an additional step required when using this service.

   If Request for Subscription Services is selected, the following notification related fields become mandatory:

   - ***Sandbox Notification URL*** - URL for receiving subscription status notifications in Sandbox mode
   - ***Production Notification URL*** - URL for receiving subscription status notifications in Production mode
10. [Option] Enter ***monthly forecasted volumes of usage***, in transactions per API per MMS, SMS, LBS as applicable.
11. Click ***Continue***. The Financial Model view is displayed. You are required to review and agree the settlement contract.
12. Click ***Continue***. The Accept Contract view is displayed.
13. Click ***download and review*** link to verify the vendor agreement.
14. Enter your name as the ***Signing Authority***.
15. Enter your ***Signing Authority Job Title***.
16. Select ***I accept the contract***.

17. Click ***Promote to Production***

An email is sent to the partner to confirm that their request to promote the project to production has been initiated and will be reviewed by the administrator. They will receive another email once a decision has been made.

The status of the project, which is *Sandbox* when created, now changes to *Pending.* When the promotion is approved, the status changes to *Production*. The states are displayed under the project name on the Partner Profile page.

> ! If you are using the subscription service for payment, go to section 6.4.3 below to complete the necessary additional step.

6.3.2 Requesting Project to Promotion – Subsequent Times

A partner needs to accept the Contract only once. Therefore, for second and subsequent applications of project promotion to production, the first and fourth steps will be omitted. Your request for promotion will be raised when you complete your project profile details and click Continue.

6.3.3 Registering Subscription Product

If using subscription payment service is intended for your project, you will need to register a Subscription Product on the Subscription Provisioning Portal, after your project is promoted to Production.

To create a Subscription Product,

1. Check your project has been approved for Promotion to Production. From the Dashboard, click ***Manage Partner*** and see that the project is displayed as *Enabled – Production*.
2. Click ***Manage Project***, to view its details.
3. In the Project Profile page, click ***Create Subscription Service*** link at the bottom of the page. You will be redirected to the Subscription Provisioning Portal.
4. Enter the necessary information to create one subscription product for your project. Follow the details as provided in a separate user guide for the Subscription Provisioning Portal.

When a subscription product is created, its *productId* will be available on the Subscription Provisioning Portal. You will need this value to activate the subscription in the Subscription API call.

6.4 Viewing Project Credentials and Endpoints

You can view your project user name, which you will have received in the 'Application created' email, and its password, and any enabled endpoints for the project.

When a project is created, it is automatically assigned a default service contract, which has a default list of sandbox Endpoints for each of the services configured in the contract for your application. These are displayed at that time.

When a project is promoted to production, a different service contract is applied, which has a default list of production Endpoints. The list of endpoints displayed will change, therefore, on the Endpoints page.

1. From the Dashboard, click through to ***Manage Partner > Manage Project*** to reach the Project Profile page.

2. Click ***Endpoints*** on the Project Profile page.

   The Manage Endpoints page is displayed, showing the project credentials and the enabled endpoints:

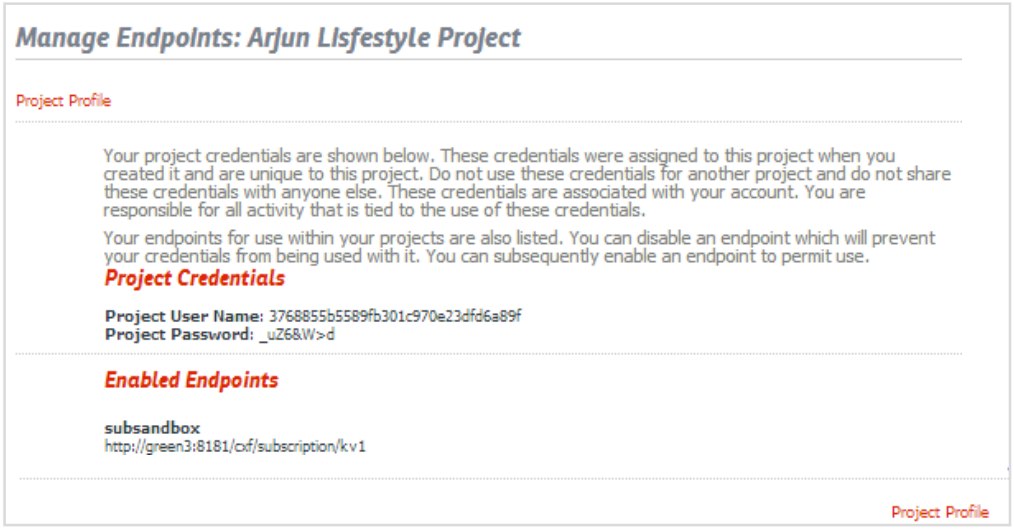
Manage Endpoints: Arjun Lisfestyle Project
Project Profile
Your project credentials are shown below. These credentials were assigned to this project when you created it and are unique to this project. Do not use these credentials for another project and do not share these credentials with anyone else. These credentials are associated with your account. You are responsible for all activity that is tied to the use of these credentials.
Your endpoints for use within your projects are also listed. You can disable an endpoint which will prevent your credentials from being used with it. You can subsequently enable an endpoint to permit use.
Project Credentials
Project User Name: 3768855b5589fb301c970e23dfd6a89f
Project Password: _uZ68W>d
Enabled Endpoints
subsandbox
http://green3:8181/cxf/subscription/kv1
Project Profile

Figure 10 Manage Endpoints page for a project

7 Working with Blogs and Forums

The two tabbed pages allow you to create and participate in developer community discourses.

- Partner Blogs – section 7.1
- Partner Forums – section 7.2

7.1 Partner Blogs

Partners can post, comment and manage blogs on the Partner Self-Care Portal.

To view the list of blogs already on the system, they must click on the ***Blog*** link.

They can filter the list of posts by:

- Category – by clicking on the category they want to use to filter the blogs, in the ***Browse By Category*** list
- Tag – by entering the keyword or term they want to use to filter the blogs and then clicking ***Search***. The tag information is added to each blog by the user when they first create it. The results are filtered according to relevance.

To view comments made on a blog they can either click on the ***Comments*** link beside the blog title, or click on the name of the blog in the ***Off The Blog*** panel.

If a partner reads a comment that they think is inappropriate, they can click the icon beside the comment. If this is deemed to be inappropriate by the Partner Self-Care Portal administrator, it will be removed.

Partners can also keep up to date on their Twitter comments, and sign up for the latest comments made on a blog via RSS by clicking on the

button.

7.2 Partner Forums

To view the list of forums available, click on the ***Forum*** link.

To view one of the forums, click on the ***forum title***. All of the threads from the forum are listed, along with:

- thread title and date initiated
- display name of the user who last responded to a thread
- date and time at which the last person responded
- number of replies to the thread.

Click the ***thread title*** to view the thread, and to reply.

Delete threads by clicking ***Delete*** beside the appropriate thread, or post new ones by clicking ***Create Thread***.

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